

The Annotated Will 2020

Co-Chairs: **Susannah Roth, TEP**
O'Sullivan Estate Lawyers LLP

Mary-Alice Thompson, C.S., TEP
Cunningham Swan Carty Little & Bonham LLP

Presenters: **Darren Lund, TEP**
Fasken Martineau DuMoulin LLP

Jane Martin
Beard Winter LLP

January 23, 2020

9:00 a.m. to 12:00 p.m.

Total CPD Hours = 2 h 15 m Substantive + 45 m Professionalism 

**Law Society of Ontario
Donald Lamont Learning Centre
130 Queen Street West
Toronto, ON**

SKU CLE20-00103

Agenda






9:00 a.m. – 9:05 a.m.


Welcome and Opening Remarks

Susannah Roth, TEP, O'Sullivan Estate Lawyers LLP

Mary-Alice Thompson, C.S., TEP

Cunningham Swan Carty Little & Bonham LLP

- 9:05 a.m. – 9:20 a.m.** **Incorporation by Reference, Including Separation Agreements, and Memoranda of Personal Effects**
(5 m )
- Jane Martin, *Beard Winter LLP*
- 9:20 a.m. – 9:25 a.m.** **Question and Answer Period**
- 9:25 a.m. – 9:40 a.m.** ***Milne* Update and Where Do We Stand on “Basket” Clauses** (5 m )
- Darren Lund, TEP, *Fasken Martineau DuMoulin LLP*
- 9:40 a.m. – 9:45 a.m.** **Question and Answer Period**
- 9:45 a.m. – 10:00 a.m.** **Family Law Protections: Protecting Assets from In-Laws**
(5 m )
- Mary-Alice Thompson, C.S., TEP
Cunningham Swan Carty Little & Bonham LLP
- 10:00 a.m. – 10:15 a.m.** **Family Law Protections: Protecting Assets from the Spouse** (5 m )
- Susannah Roth, TEP, *O’Sullivan Estate Lawyers LLP*
- 10:15 a.m. – 10:20 a.m.** **Question and Answer Period**
- 10:20 a.m. – 10:40 a.m.** **Coffee and Networking Break**
- 10:40 a.m. – 10:55 a.m.** **Working with Families, How and When to Involve Them**
(15 m )
- Susannah Roth, TEP, *O’Sullivan Estate Lawyers LLP*

- 10:55 a.m. – 11:00 a.m.** **Question and Answer Period** (5 m )
- 11:00 a.m. – 11:15 a.m.** **Registered Plans** (5 m )

Mary-Alice Thompson, C.S., TEP
Cunningham Swan Carty Little & Bonham LLP
- 11:15 a.m. – 11:20 a.m.** **Question and Answer Period**
- 11:20 a.m. – 11:35 a.m.** **Dealing with Digital Assets**

Jane Martin, *Beard Winter LLP*
- 11:35 a.m. – 11:40 a.m.** **Question and Answer Period**
- 11:40 a.m. – 11:55 a.m.** **Residence Trusts and Other Real Property Issues**

Darren Lund, TEP, *Fasken Martineau DuMoulin LLP*
- 11:55 a.m. – 12:00 p.m.** **Question and Answer Period**
- 12:00 p.m.** **Program Ends**